

Warehouse — Learning Path

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This learning path is for warehouse users who receive, inspect, store, move, issue, return, and track goods. You will learn how to use Warehouse screens to follow goods through their lifecycle—from receipt and quality inspection through stock visibility, internal transfers, outbound delivery, returns, and external-service activity.

Learning objectives

- By the end of this path you can receive incoming shipments and monitor items awaiting inspection or storage.
- By the end of this path you can record inspections and progress accepted goods into warehouse stock.
- By the end of this path you can review stock, product-level stock, and package information before planning movements.
- By the end of this path you can create and track transfer orders, goods issues, delivery notes, and return notes.
- By the end of this path you can manage warehouse documents that relate to external services and review their records.

Prerequisites

- Access to the Warehouse app.
- Permission to view the Warehouse list screens relevant to your work.
- Permission to create and edit receiving shipments, inspections, transfer orders, goods issues, delivery notes, return notes, and external-service records as applicable.
- Familiarity with the goods, shipments, packages, and warehouse processes used by your organization.

Module 1: Receive and make goods ready for storage

Goal: Start the inbound process by recording arrivals, checking what requires action, and storing goods after they are ready.

Lesson 1.1: Record an incoming shipment

When goods arrive at the warehouse, create a receiving shipment so the arrival can enter the warehouse process. Use [receiving shipment](#) to create the incoming shipment record, then use [receiving shipment](#) to work with the shipment after it has been created. Review the inbound workload in [Awaiting inspection](#) and [Awaiting storage](#) to understand where received goods are waiting in the process.

Practice: Create or open a receiving shipment and identify whether its goods should next be reviewed for inspection or storage.

Lesson 1.2: Store goods that are ready

When inbound goods are ready to be put away, create the warehouse stocking activity. Use [Stocking](#) to record the storage action, then check [Received](#) to review received goods and [Stock](#) to view warehouse stock after storage activity.

Practice: Create a stocking record for goods ready to be stored, then review the received and stock lists.

Module 2: Inspect inbound goods and maintain stock visibility

Goal: Use inspection records and stock views to ensure goods are evaluated and visible to warehouse operations.

Lesson 2.1: Inspect goods awaiting quality review

When a received item requires inspection before further handling, start from [Awaiting inspection](#). Create the inspection using [inspection](#), then work with the resulting [inspection](#) record. Review completed or existing inspection activity in **Inspections**, and open the related [Inspection](#) when you need to review or update its record.

Practice: Select an item awaiting inspection, create or open its inspection record, and review it in the inspections list.

Lesson 2.2: Reconcile storage readiness with inventory views

After inspection and storage decisions are made, use [Awaiting storage](#) to focus on goods still waiting to be stored. Use [Stock by products](#) when you need a product-oriented view of inventory, [Stock](#) for overall stock visibility, and [Package](#) when package-level information is needed.

Practice: Compare a product in the stock-by-products view with the warehouse stock and packages views.

Module 3: Move inventory and fulfill outbound needs

Goal: Plan internal inventory movement and create the documents used to issue and deliver goods.

Lesson 3.1: Transfer goods within the warehouse process

When inventory needs to be moved through a transfer process, create a transfer order using [transfer order](#). Use [transfer order](#) to work with the transfer after creation, and monitor transfer activity in [Transfer Order](#). Before creating the movement, review [Stock](#) or [Stock by products](#) to confirm the inventory context.

Practice: Create or open a transfer order and locate it in the transfer-orders list.

Lesson 3.2: Issue goods for an outbound requirement

When goods must leave inventory, create the goods issue in [Goods Issue Note](#). Review existing issues in **Issue goods list**, and open the related [Goods Issue Note](#) when you need to continue working with a specific issue record. Use the stock views to understand the inventory affected by the issue.

Practice: Create or open a goods issue and verify that you can find its record from the issue-goods list.

Lesson 3.3: Create the delivery documentation

When an outbound delivery requires its warehouse document, create a delivery note in [Delivery note](#). Track delivery-note activity in **Delivery notes**, and use the associated [Delivery Note](#) to review or update the delivery-note record.

Practice: Create or open a delivery note, then locate it in the delivery-notes list.

Module 4: Handle exceptions, returns, and external-service work

Goal: Keep nonstandard warehouse activity traceable through return and external-service records.

Lesson 4.1: Record a return to the warehouse process

When goods are returned, create a return note using [Goods Return Note](#). Use [Goods Return Note](#) to review return-note activity and use [Received](#) and the stock views to understand the related inbound and inventory context.

Practice: Create or open a return note and find it in the return-notes list.

Lesson 4.2: Manage goods associated with an external service

When warehouse goods require an external-service process, create the record in [External Service Type](#). Track activity in **External services**, and open the associated [External Service Type](#) to continue working with a specific record.

Practice: Create or open an external-service record and locate it in the external-services list.

Lesson 4.3: Use lists to manage work in progress

At the start or end of a warehouse work period, use [Awaiting inspection](#), [Awaiting storage](#), [Transfer Order](#), **Issue goods list**, and **Delivery notes** to identify work that needs attention. Use document-specific Warehouse records when you need to work beyond the list view.

Practice: Choose one work queue and one completed-document list, then identify a record you would review next.

Final assessment

1. A shipment has arrived, but the goods must be quality checked before they can be stored. Which process and screens should you use first?
2. You need to determine whether a product is available before creating an internal movement. Which stock views should you consult, and where do you create the movement document?
3. A warehouse worker has created a goods issue and now needs to find and continue working with that specific record. Which screens should they use?
4. Goods have been returned and must be documented in Warehouse. Which document should be created, and which list should be used to track it afterward?

5. A record relates to work performed by an external service provider. How do you create, locate, and open the related warehouse record?

Answers

1. Use [receiving shipment](#), then review [Awaiting inspection](#) and create or work with [inspection](#).

Why: The inbound flow records receipt first and uses inspection for goods requiring quality review.

2. Consult [Stock](#) and, when needed, [Stock by products](#), then create the movement in [transfer order](#).

Why: Stock views provide inventory context before a transfer order is created.

3. Use **Issue goods list** to find the issue, then open its [Goods Issue Note](#).

Why: The list locates issue activity, while the record screen supports continued work on the specific document.

4. Create a [Goods Return Note](#) and track it in [Goods Return Note](#).

Why: Return notes are the Warehouse documents and list view provided for returned goods.

5. Create the activity in [External Service Type](#), locate it in **External services**, and open its [External Service Type](#).

Why: These screens support the full create, track, and record-review workflow for external-service activity.